eGrATIS
electronic Grants Application Tracking Information System

2009 End of Year Progress Report

Grantee User Guide

February 2010

CDC

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This User Guide is intended to provide steps for preparing and completing the 2009 End of Year Progress Report using eGrATIS. All data shown in images or examples are for example purposes only.

I. Introduction

What is eGrATIS?

eGrATIS (Electronic Grants Application Tracking Information System) is a web-based application developed for use by Grantees for preparation and submission of their federal grant budget application for funding their immunization program. eGrATIS is hosted on a Secure Data Network (SDN) server to insure the safety of the entered Sensitive but Unclassified data.

Reporting End of Year Progress on 2009 Objectives

The End of Year Progress Report module supports the creation of your End of Year Progress Report. For each of your 2009 Application objectives, you will provide its status as well as progress and barriers to date. *Submitting in eGrATIS finalizes your report resulting in a generated report to be sent to PGO.*

"Official" submission to PGO

After you have completed and submitted the End of Year Progress Report in eGrATIS, you will then download the Progress Report and submit this document to PGO per their guidelines.

Who are eGrATIS Users?

Your local Program Manager determines who will use eGrATIS, as well as what role you will have. This may include view-only or create and edit ability in different parts of the system. (If you have Super User role for End of Year Progress report, you will also have it for the Application module.)

User Level	You may…
Super User	Enter and edit progress on objectives. Approve objective progress updates. Manage attachments and view system-generated report. Finalize (Submit) the progress report.
User Level 1 & User Level 2	Enter and edit progress on objectives. Manage attachments and view system-generated report. *Cannot* finalize (submit) the progress report.
User Level 3 & User Level 4	View (but not edit) the progress report. View attachments and system-generated report.

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II. Access eGrATIS

You can access eGrATIS only if you have applied for and installed a CDC Secure Data Network (SDN) Digital Certificate and been given rights by the eGrATIS system administrator. If you do not have a certificate or access to eGrATIS, contact the SDN Helpdesk 1-800-532-9929, option 1. If you are unable to log into eGrATIS, please contact the eGrATIS System Administrator, Cindy Whitehead (cdw1@cdc.gov) or the eGrATIS System Administrator backup, Igor Bulim (idb1@cdc.gov).

Steps to Accessing eGrATIS

1. Open your internet browser (e.g., Internet Explorer).

2. Enter the following web address: https://sdn.cdc.gov.

3. Press the **Enter** key on the keyboard.

4. Ensure that your digital certificate is selected on the Choose a Digital Certificate screen and select **OK**. You will be taken to the login screen of the CDC Public Health Partners website. (This may only occur the first time you access the SDN site after importing your digital certificate.)

5. Enter your **Challenge Phrase**. This phrase was created by you when applying for the digital certificate.

6. Select **Submit**. If submission is successful, you will be logged into the CDC Public Health Partners website. If you have any problems logging into the SDN site, please contact the SDN helpdesk at 1-800-532-9929, Option 1.

7. Select the **eGrATIS** link from the **My Applications** section to log into eGrATIS.

8. If you are assigned more than one User Role, choose the role you need. Otherwise, skip to the next step.

9. You will be taken to the eGrATIS Home page, which lists the various modules available to you.
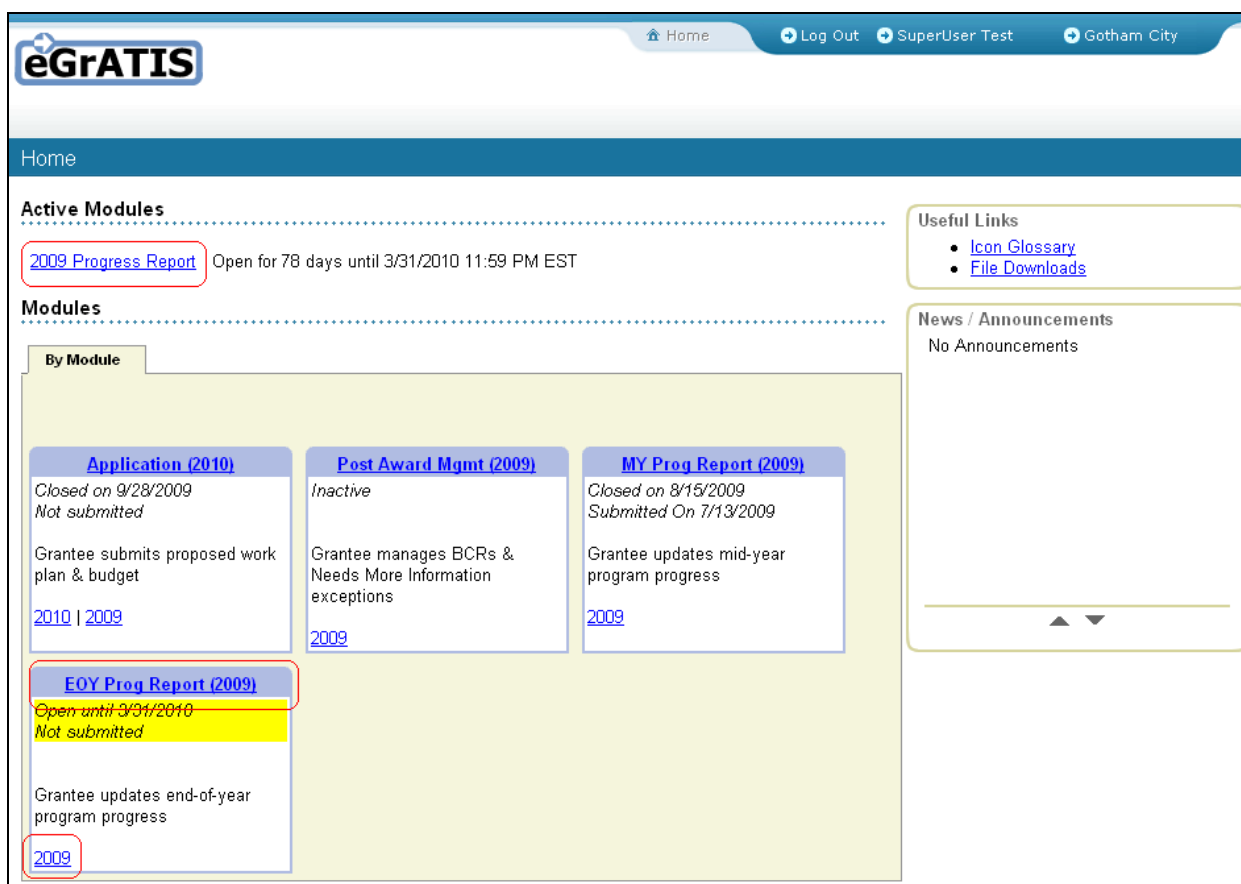
10. Verify your name, user role, and the grantee name. The grantee name identifies whose information you are viewing.
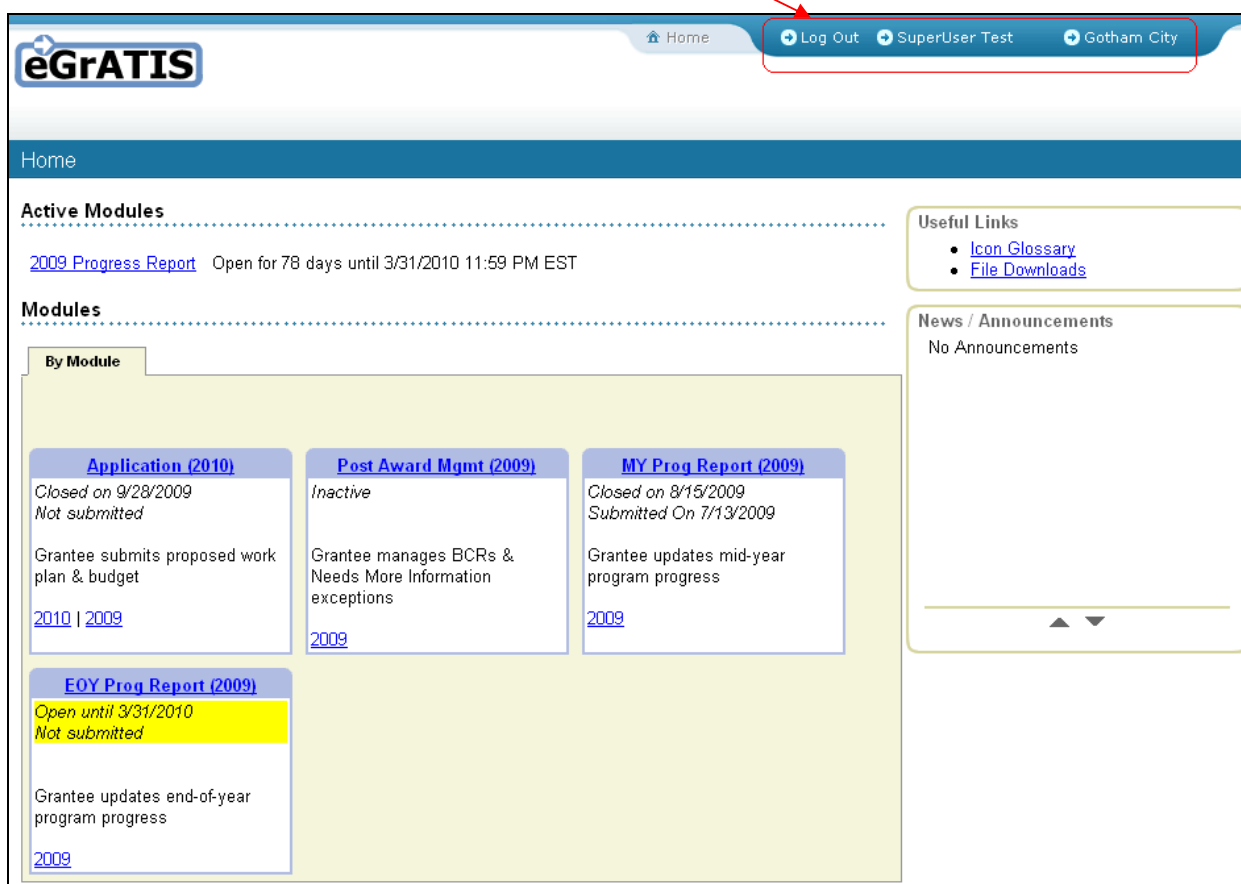
III. Access Progress Report Module
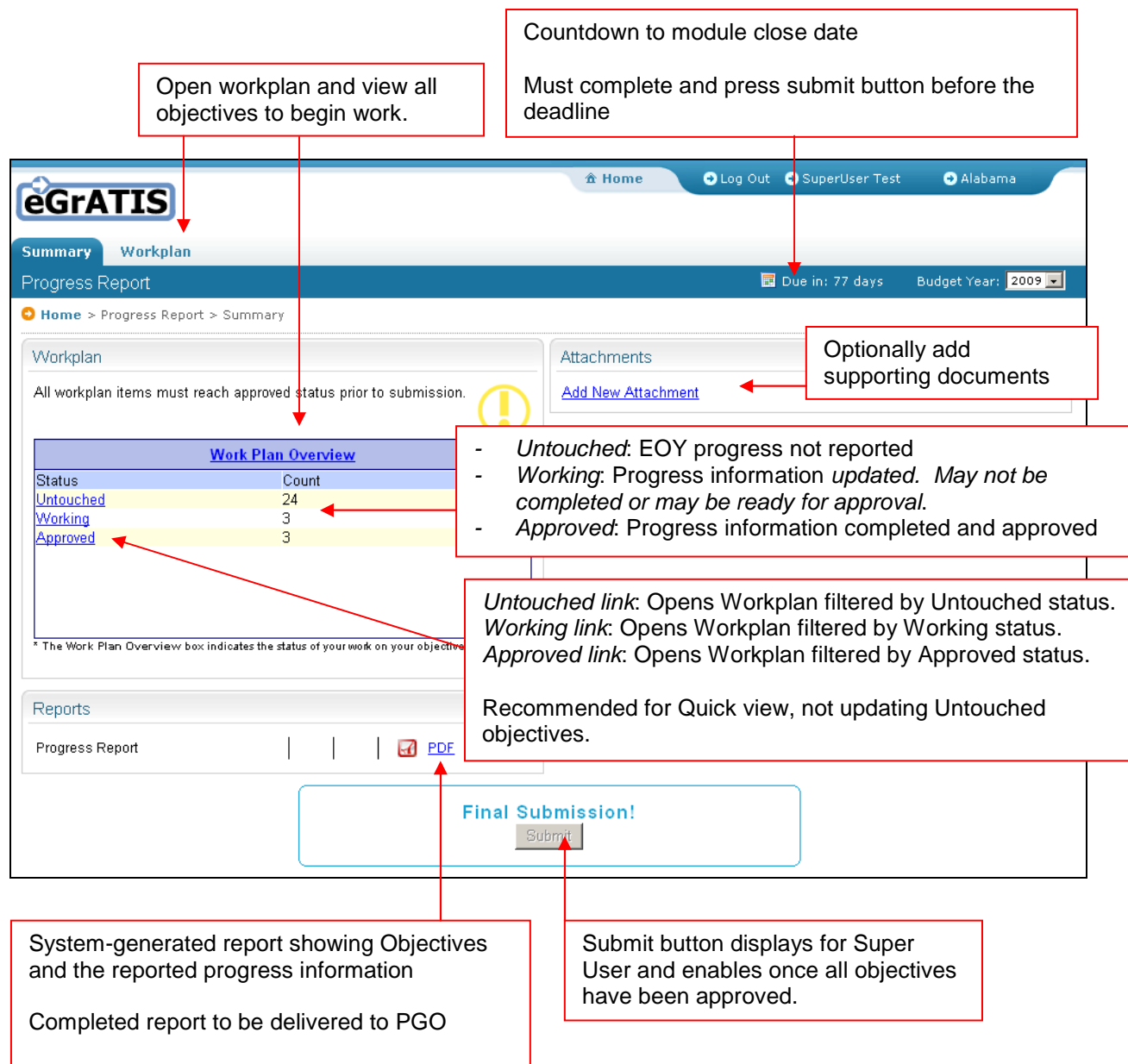
On the home page, under Active Modules, select the "2009 Progress Report" link under **Active Modules** or "EOY Prog Report (2009)" under **Modules** section.

All data in the screenshots are for demonstration purposes only.

The End of Year Progress Report module will display. (*See next page*)

Countdown to module close date

Must complete and press submit button before the deadline

Open workplan and view all objectives to begin work.

Optionally add supporting documents

- *Untouched*: EOY progress not reported
- *Working*: Progress information *updated. May not be completed or may be ready for approval*.
- *Approved*: Progress information completed and approved

Untouched link: Opens Workplan filtered by Untouched status.
Working link: Opens Workplan filtered by Working status.
Approved link: Opens Workplan filtered by Approved status.

Recommended for Quick view, not updating Untouched objectives.

System-generated report showing Objectives and the reported progress information

Completed report to be delivered to PGO

Submit button displays for Super User and enables once all objectives have been approved.
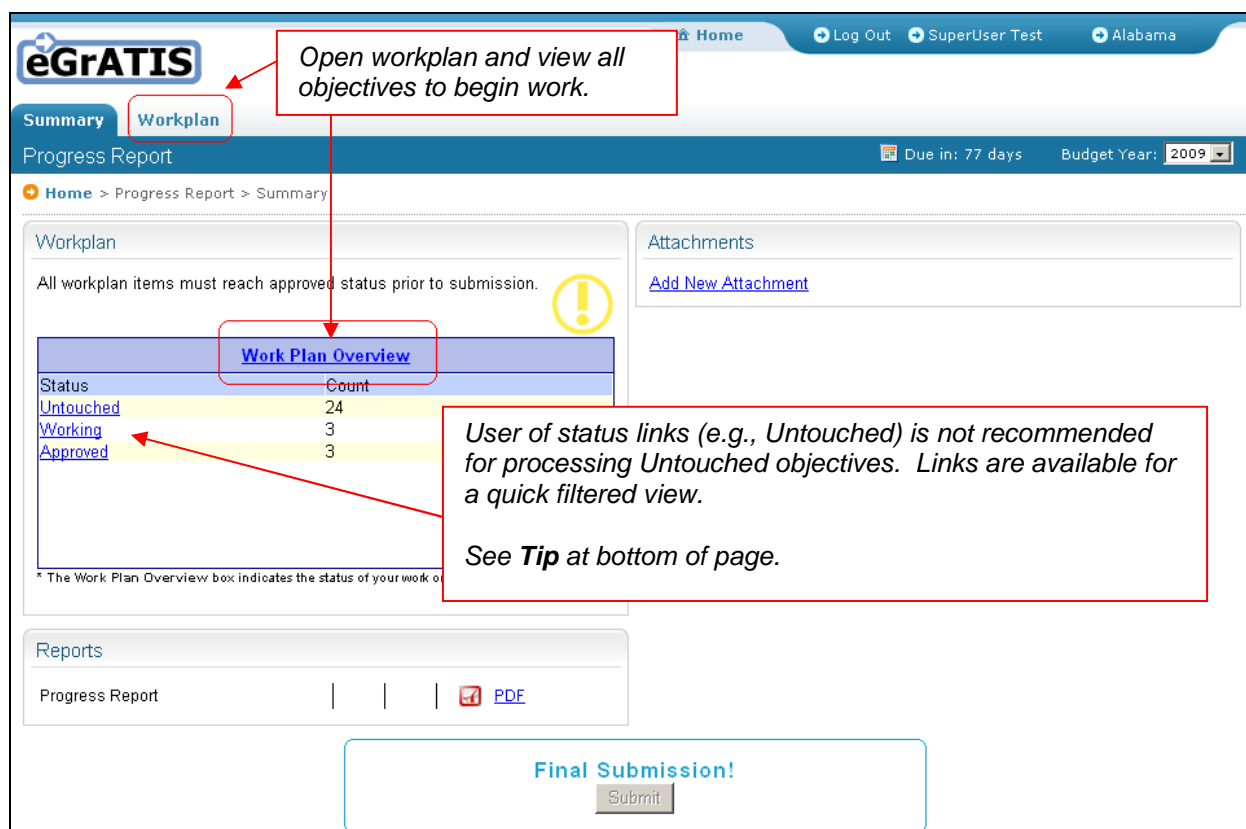
IV. Report Progress on Objectives – Provide Updates

You must report a progress update on every objective.

1. Select the Workplan navigation link from the End of Year Progress Report summary page. Choose the Workplan tab or the Work Plan Overview link.

The system will present the objectives entered for the 2009 Application.

⊙ **Tip:** If you open the Workplan page by selecting the "Untouched" status link, this filter is applied. When you update any field on the Progress Update tab, the status is changed to Working, Therefore, the objective will be "filtered out" of the list of Untouched objectives. It is recommended that you change the filter to include Working status or go back to the Summary tab and choose the Workplan tab directly so you may change multiple fields on the Progress Update tab and keep the objective in the list.

List of workplan objectives displayed

2.   Select an **Objective**.

The objective details will display. You will see the following tabs:

- State SMART Objective
- Performance Measure
- Grantee Activities
- Associate to Components
- Progress Update

3. Select the **Progress Update** tab.

| 2009 - 0002 | issues with planning items. | | | | $1,501 | Untouched | C1.2 , C1.3 |

| State SMART Objective | Performance Measure | Grantee Activities | Associate to Components | Progress Update |

Objective Name: issues with planning items.

Estimated start date: 01/01/2009

Estimated end date: 12/31/2009

Who will do the work?: Jan Janson

What is the primary action to be completed?: decrease

Measurement type: percent of

What will be measured?: issues with planning items.

State SMART Objective, Performance Measure, Grantee Activities, and Associate to Components tabs are read-only.

Progress Update tab is editable.

Baseline: 20%

Target: 10%

Smart Objective Preview

By 12/31/2009, Jan Janson will decrease the percent of issues with planning items. from 20% to 10%. Work on this objective will begin on 01/01/2009.

Smart Objective Preview

* Required

| 2009 - 0003 | Immunization Information Systems | | | | $21,001 | Untouched | C3.1 , C3.2 , C3.3 , C3.4 , C3.5 , C3.6 |

⚠ **Important:** *All objectives must be 'touched' and then approved for submission. Therefore, you MUST update the Progress Update Tab to report for End of Year. This changes the objective status to Working. Untouched objectives cannot be moved to Approved objective status.*

The Project Update tab is pre-populated with your Mid Year Progress Report responses.

Objective status changes to Working when Progress Update tab info is edited.

The fields are pre-populated with the information entered for the Mid Year Progress Report.

*Update to reflect the End of year Progress. The system **requires** you update at least one field on this tab.*

If NO CHANGES** since Mid Year Progress Report, add the following to the Progress text already there:* ***Unchanged from MYPR.

⚠️ **IMPORTANT:** If there are **no changes to progress since** the Mid Year Progress Report, enter the following statement *after* the current text in the Progress field: **Unchanged from MYPR**

4. If applicable, update the value for "**Status**" if it needs updated. (e.g., Partially met to Met).
    a. Met
    b. Partially met
    c. Not met

5. Enter/Update "**Progress**". In the response box provided, describe your progress to date, making sure to highlight successes.

6. Enter/Update "**Barriers**".   In the response box provided, describe barriers you have overcome and/or those yet to be addressed, and request assistance where needed.

7. Enter "**Progress Measure**". In the response box provided, provide progress measured at this time. Refer to your objective's Baseline/Target Values for increasing, decreasing or maintaining a value. (e.g., Increase percent from 70% to 86%. Progress Measure = 75%)
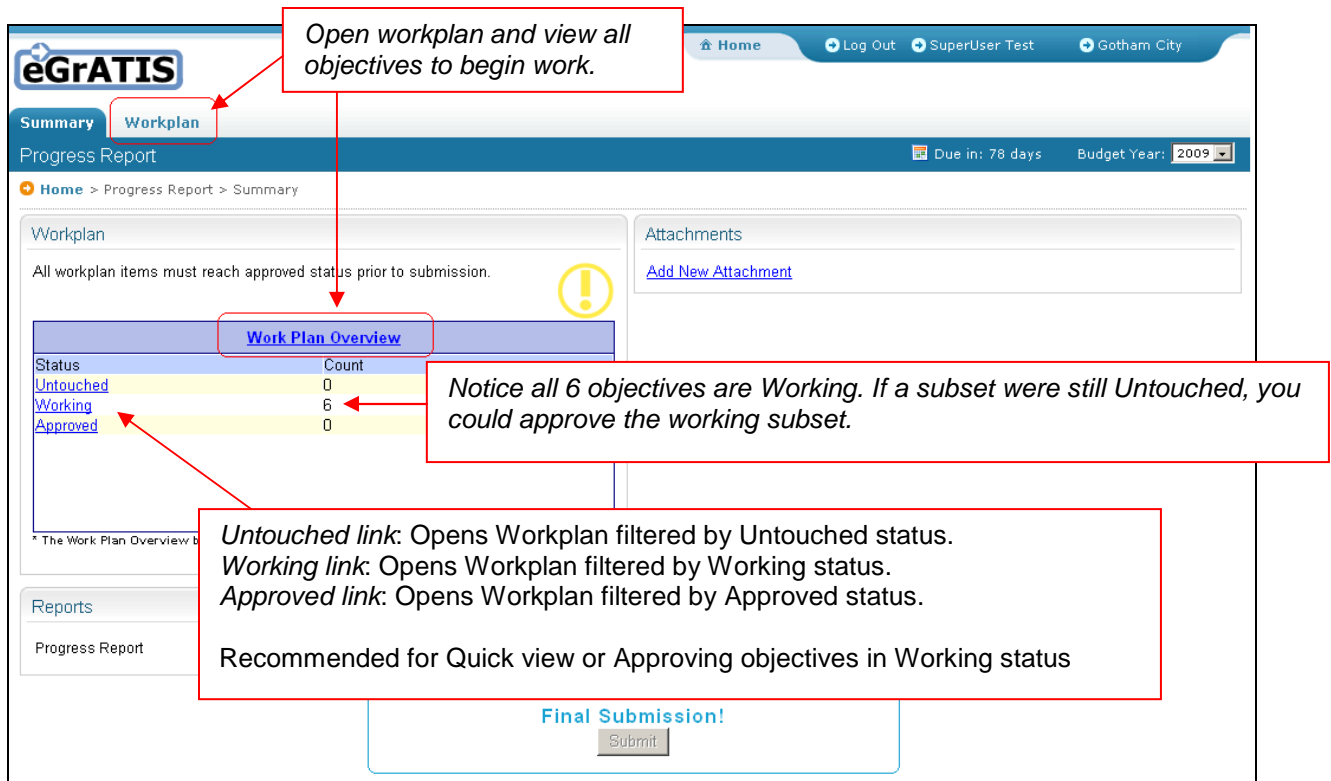
    ℹ️ **Note**: **Progress Measure** is **only available and required if** the value for "What is the primary action to be completed?" is "decrease", "increase", or "maintain".

    ℹ️ **Note**: If required data is missing, a red flag 🚩 will appear.

V. Report Progress on Objectives – Mark Approved

Marking an objective as Approved indicates that the reported progress for the objective is accurate and ready for submission. Only a Super User may approve objectives.

1. Select the Workplan navigation link from the End of Year Progress Report summary page. Choose the Workplan tab or the Work Plan Overview link.

The system will present the objectives entered for the 2009 Application in Edit mode.

Notice the Work Plan Overview indicated 6 Working objectives.

Since the objectives are Working and do not have any red flags (i.e., missing information), they may be approved.

2. Select **Review tab**. Review the progress update information (Status, Progress, Barriers and Current Value.

3. Select the **Select All** button.

The check box for each objective is checked.

Can also Unselect All

Checkboxes checked.

4. Select the **Approve Selected** button.

All objectives will be marked approved.

> ⓘ **Note**: The system will not allow you to approve objectives missing progress update information or if it has a status of Untouched. A warning message will be given listing those with missing information followed by those that are untouched.

You may now go back to the **Summary** page of the End of Year Progress Report to:

- Add any supporting documents as attachments (optional)
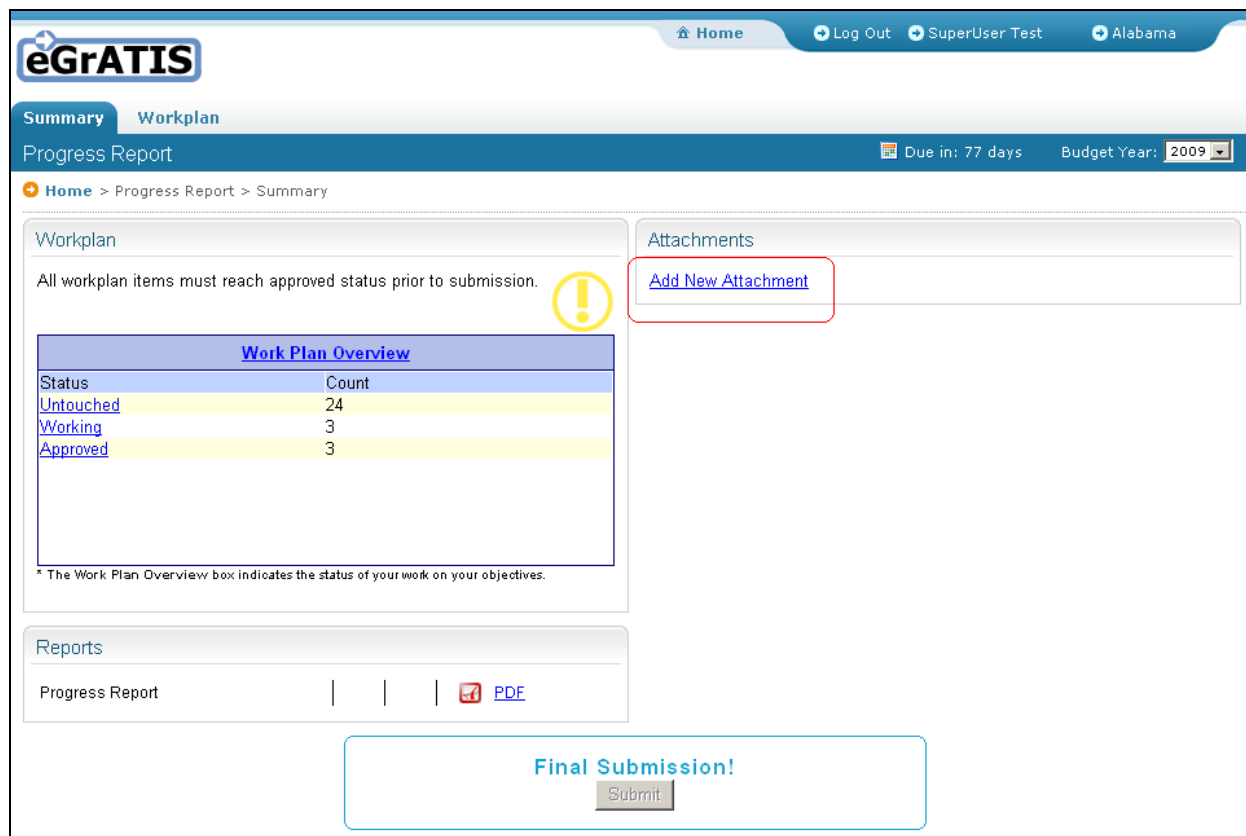
- Submit

> ⓘ **Note**: All Objectives must be in Approved status to allow submission of the End of Year Progress Report.

VI.Upload/View Attachments (Optional)

Upload Documents

Upload documentation by using the following steps

1. Select the Summary tab.
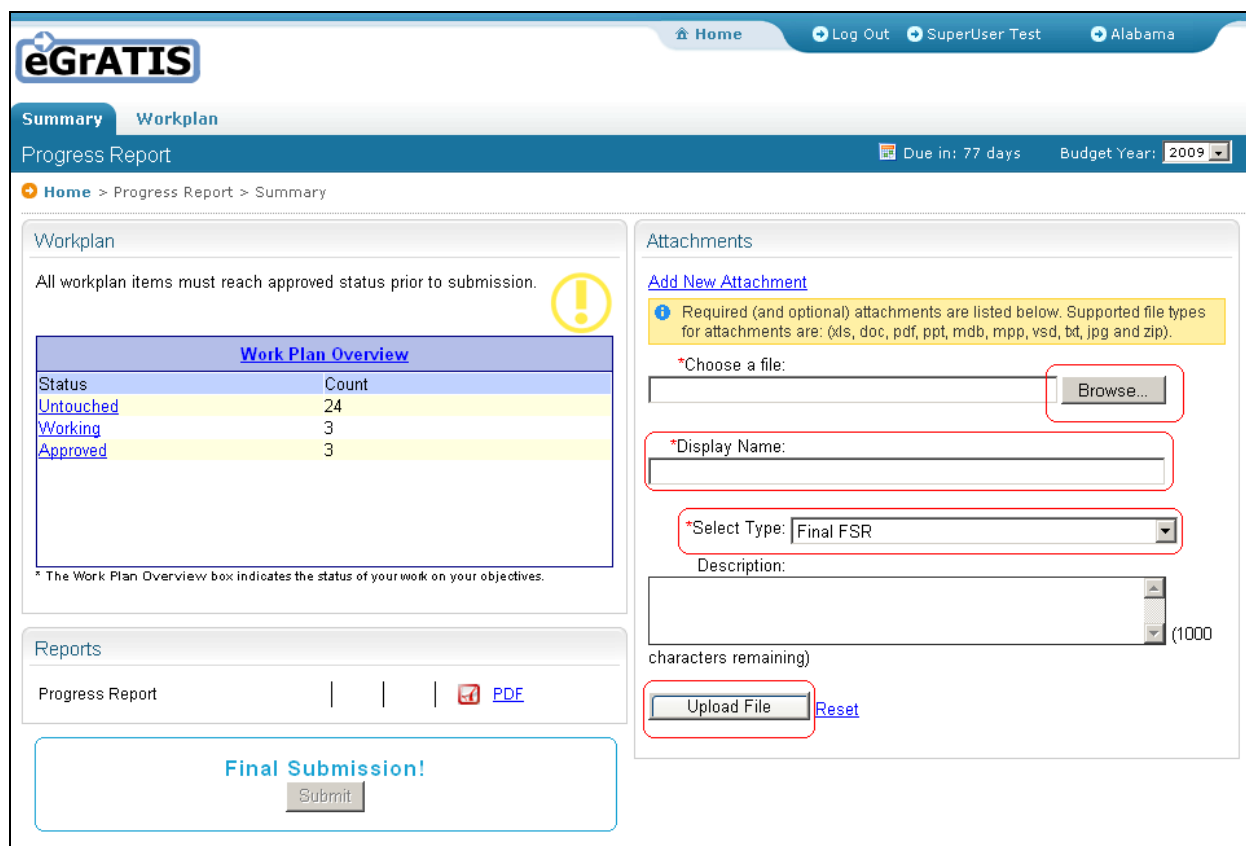2. Select the **Add New Attachment** link in the Attachments section.

Data entry fields will display in the attachments section.

eGrATIS

3. Select **Browse** in the Attachments area to find the file you wish to attach.

4. Enter a **Display Name** for the attachment. This is the name that will appear as a link in the Attachments area after the attachment has been added.

5. Select the **Select Type** from the pull down menu. Options are "Estimated FSR" and "Other Additional End of Year Progress Report"

6. Enter a **description** of the document, if you wish.

7. Select the **Upload File** button. (**Reset** clears the file, display name and description fields)

   The file is uploaded and displayed on the page.

   Under the **Name/Description**, you will see the

   - File name

   - Description

   - When it was uploaded and

   - Who uploaded it

Click to add more attachments; No limit to the number attached.

Final FSR and Other Additional End of the Year Progress Report documents are Optional.

Red flag means that type of file is not attached. Since Final FSR is optional, the flag is OK.

Green check mark means at least one file of that type is attached.

May delete files before submission depending on role's permissions.

Note: Red flag means that type of file is not attached. Since these files are optional, the flag is OK. You may still submit.

View Documents

Select the **Name/Description** link of the file you want to view in the Attachments section.

Select the File Name/ Description link

The system prompts you to **Open** or **Save** the file.
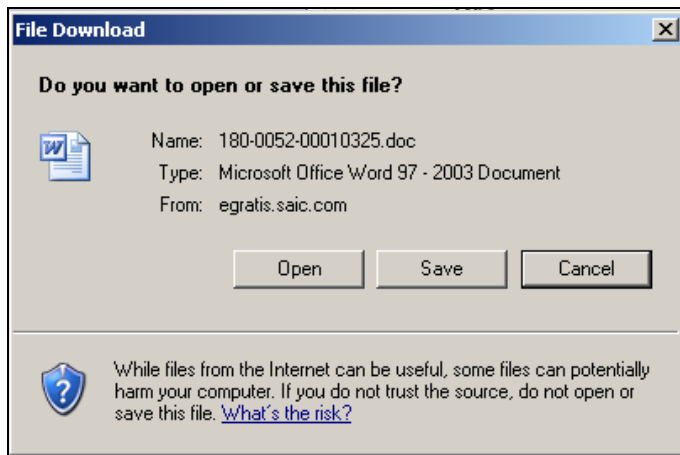
Open the Report

1. Select the **Open** button.   The report is displayed in the application for the file's format.

Save the Report

1. Select the **Save** button.
2. Use the existing file name or enter a new file name of the document, if you wish.
3. Choose Close when the download is completed.

VII. Submit Progress Report in eGrATIS

Submission of the Progress Report in eGrATIS indicates you have completed the report. After submission, the Progress Report module becomes read-only so no more changes may be made to the report.

Only the Super User may select the Submit button in the Progress Report module.

1. First, approve all objectives. This enables the Submit button.

2. Select the **Submit** button.

   The system will provide a confirmation message.
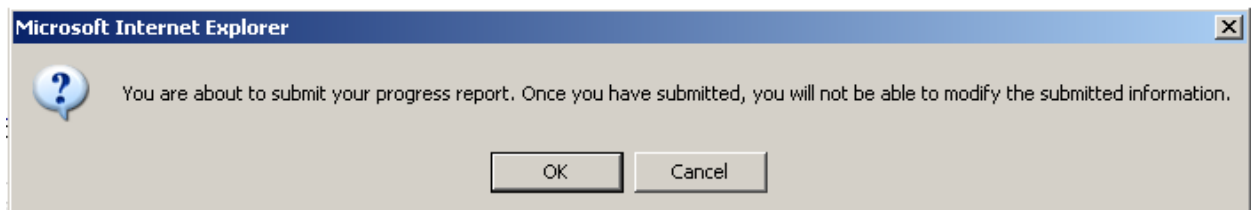
3. Select **OK**.

You will receive a successful submit message.

Final Submission!
Progress Report has been successfully submitted.

The module is submitted and is now read-only.

VIII.   Open/Save End of Year Progress Report

You can view or save your End of Year Progress Report by using the following steps

1.   Select the Summary tab.

2.   Click the report link from the Reports section.

The system begins to process the report. Two additional browser windows will open. One will look like the following:
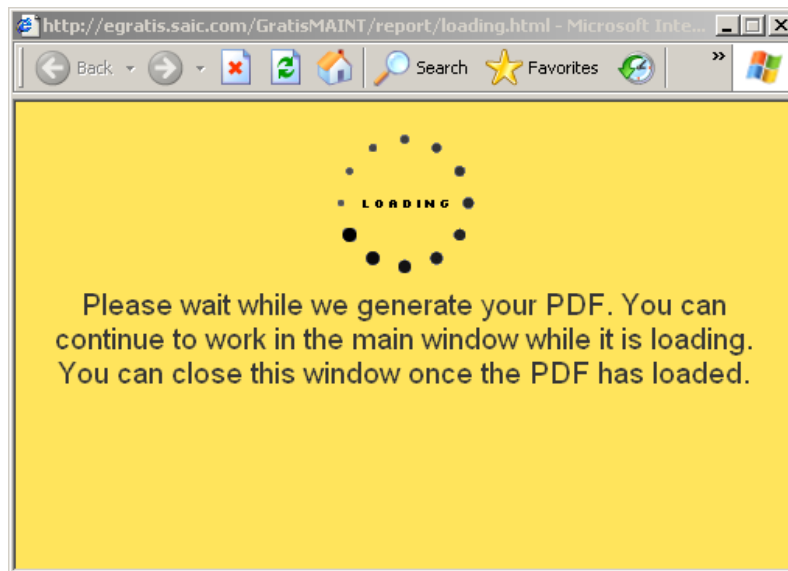
The system prompts you to **Open** or **Save** the file.
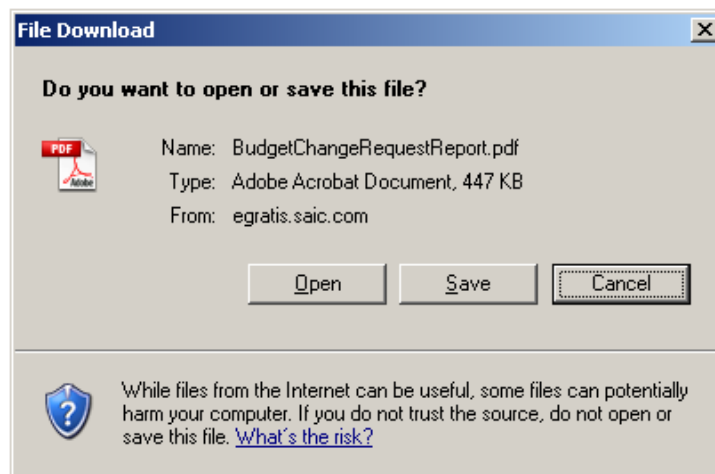
Open the Report

1. Select the **Open** button.

    The report is displayed in the application for the given format. The system will open the PDF file in Adobe Acrobat.

2. After viewing the report, close the two additional browser windows.
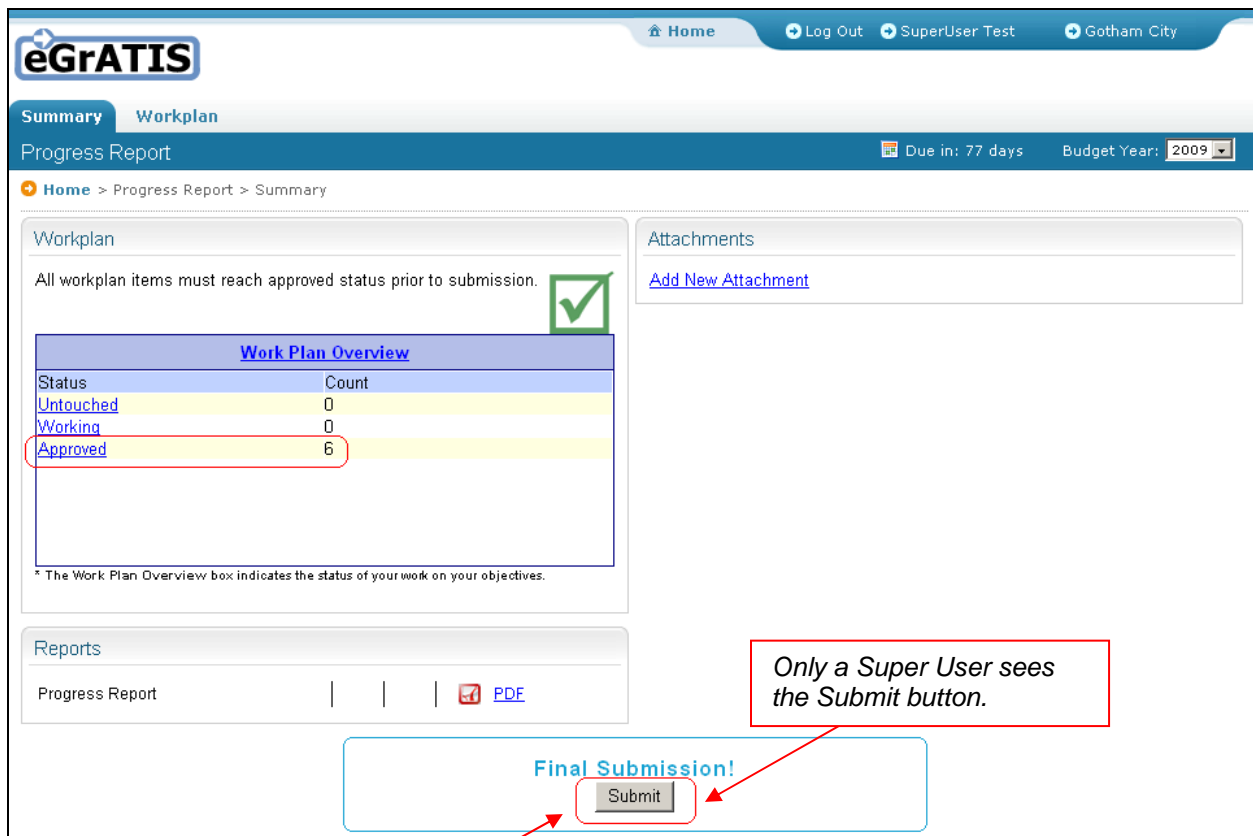

Save the Report

1. Select the **Save** button.

2. Use the existing file name or enter a new file name of the document, if you wish.

3. Choose Close when the download is completed.

Appendix A: End of Year Progress Report (sample page of report)

The End of Year Progress Report provides the content of the objectives, including the following progress status information:

- **Status**: Indicates if the objective is not met, partially met or met.
- **Progress**: Describes the progress to date, making sure to highlight successes
- **Barriers**: Describes barriers that have been overcome and/or those yet to be addressed, and requested assistance where needed.
- **Progress Measure**: Provides progress measured at this time. Refer to the objective's Baseline/Target Values for increasing, decreasing of maintaining a value. (e.g., Increase percent from 70% to 86%. Progress Measure = 75%)

Header

Gotham City (H23/IP-123456)
2009 End of Year Progress Report
CDC-RFA-IP08-803

Grantee name (number)
Report Title
Program Announcement Number

Workplan Details

The Workplan Details section displays field level details for each objective. Objectives are listed in Objective Number sequence.

(*See next page*)

The Objective's status (Untouched, Working or Approved)

The final report for submission should contain all Approved objectives.

2009-0002: (Approved) : Issues with planning items.

Objective Details

Modification State:	New Objective
SMART Objective Statement:	By 12/31/2009, Jan Janson will decrease the percent of issues with planning items. from 20% to 10%. Work on this objective will begin on 01/01/2009.
Performance Measure:	Evaluation Measure
Status:	Met
Progress:	Met the measure by completing A, B and C.
Barriers:	None
Progress Measure:	10%

Progress Update Info

Grantee Activities:

ID	Activity Description	Timeline
1	Activity 1	

Associated Requirements

| Component	Description	Split %
Chapter 1, Program Requirement 1.2	All grantees will actively engage in self-evaluation to ensure that their findings guide the program in making necessary changes to more effectively carry out their mission of achieving and sustaining high immunization rates and maximizing programmatic outcomes.	50.0%
Chapter 1, Program Requirement 1.3	Additional Recommended Activities	50.0%

Footer

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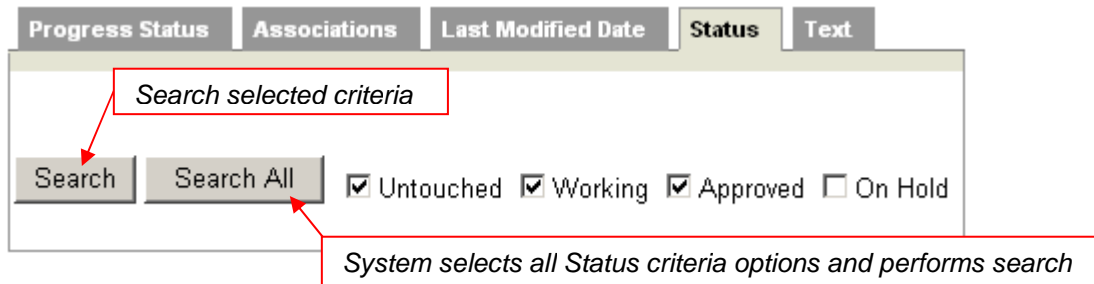## *Appendix B: Filter Objectives List*

When looking for a specific Objective, you may choose to filter the list. Use the following procedure to filter the list.

1. Expand the filter by choosing the circled down arrow.
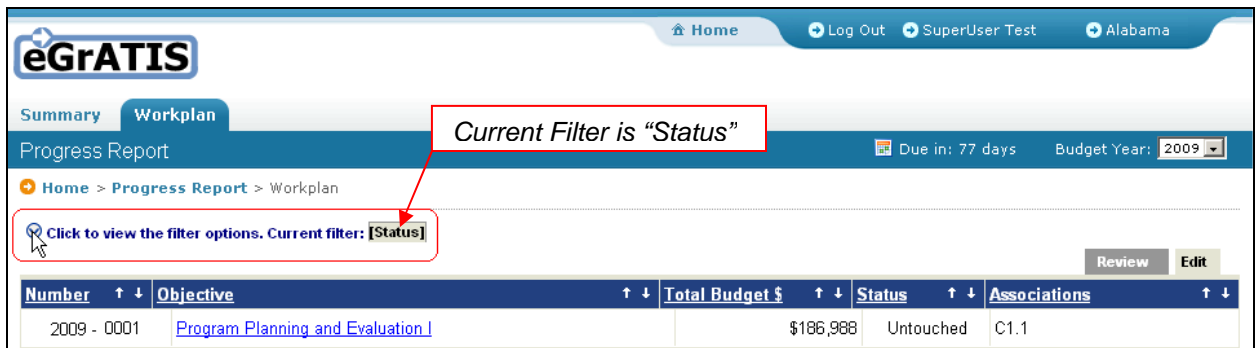
Default: Status tab

The filter is expanded. The default is to show Objectives of status types Untouched, Working and Approved.

2. Select criteria by checking/un-checking options.

3. Select "**Search**" button to search on the selected criteria.

4. To search on other criteria, select the desired Criteria tab (**Progress Status**, **Associations**, **Last Modified Date**, **Status**, **Text**), and follow the steps above.

🛈 **Note**: Only one Criteria Tab may be searched at a time.

🛈 **Note**: Selected search criteria are not saved if you leave the Workplan page.

Progress Status tab

Associations tab

IPOM Chapters or special projects to which objectives may be associated

Last Modified Date tab

Place cursor over the date to activate date control.

Text tab

Note: When searching for numbers, enter more than a single digit. E.g., 21